

Hodge Adviser Portal Guide



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Hodge Adviser Portal Guide

This guide will help you quickly obtain a decision for your client's mortgage application.

You should have already obtained details such as your client's income, expenditure, savings, property details and their permission for you to apply on their behalf.

Access

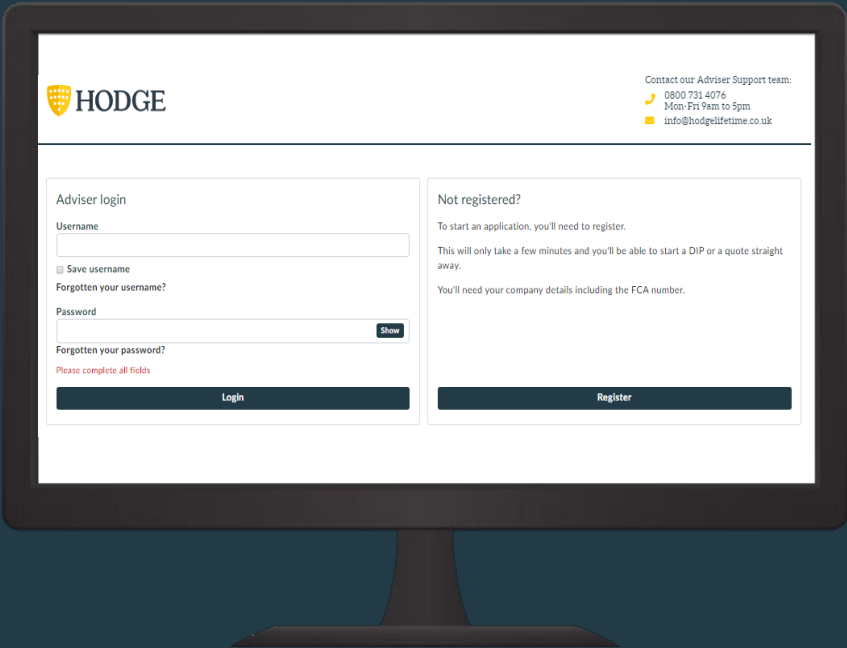
You'll need to register to use the Hodge Adviser Portal.

To do this, click "Register" on the home screen and complete your company details including FCA number.

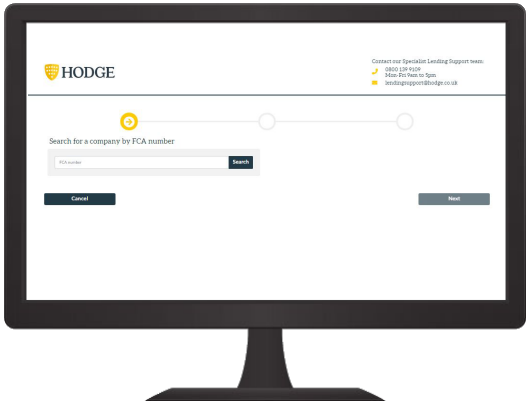
You'll receive an email confirming your registration and asking you to set up your username, password and security word.

Registration

Click the link provided in the email. This will take you to the login page where you can register your details.

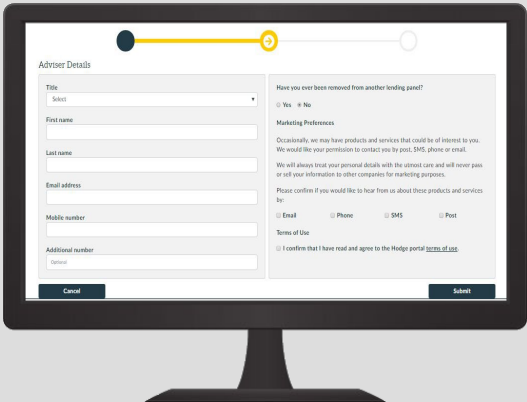


Company Details



Search for your company using your company's FCA number.

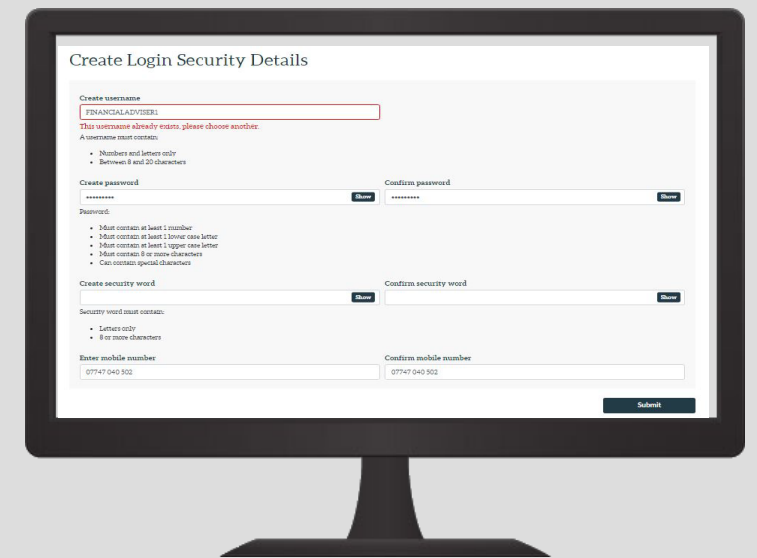
Your Details



Complete your details including your Marketing Preferences and confirm that you've read and agree to our terms of use.

Your Details

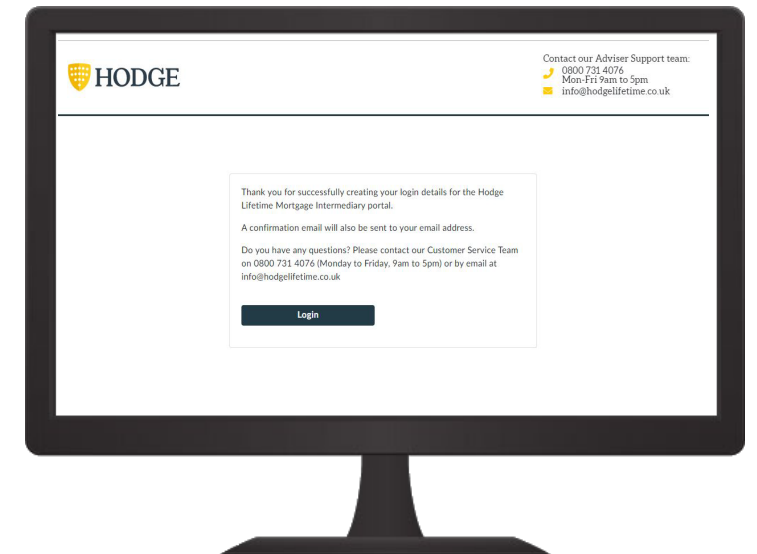
Create a unique username, password, and choose a security word.



The screenshot shows a web form titled "Create Login Security Details". It contains four main sections: "Create username", "Create password", "Create security word", and "Enter mobile number". The "Create username" section has a text input field with the value "ZINWANGALADY78923" and a red error message below it: "This username already exists, please choose another." Below the error message, it says "A username must contain:" followed by a bulleted list: "Numbers and letters only" and "Between 8 and 20 characters". The "Create password" section has a text input field with "*****" and a "Show" button. The "Create security word" section has a text input field with "*****" and a "Show" button. The "Enter mobile number" section has a text input field with "07747 040 902" and a "Confirm mobile number" section with another text input field with "07747 040 902". A "Submit" button is at the bottom right of the form.

Confirmation

To complete the registration you'll be sent a confirmation email to verify your email address.



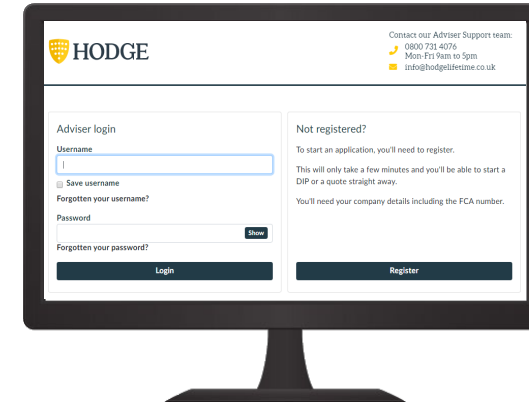
The screenshot shows a confirmation page on a computer monitor. At the top left is the HODGE logo. At the top right is contact information: "Contact our Adviser Support team: 0800 731 4076 Mon-Fri 9am to 5pm info@hodgelifetime.co.uk". The main content area has a white box with the following text: "Thank you for successfully creating your login details for the Hodge Lifetime Mortgage Intermediary portal. A confirmation email will also be sent to your email address. Do you have any questions? Please contact our Customer Service Team on 0800 731 4076 (Monday to Friday, 9am to 5pm) or by email at info@hodgelifetime.co.uk". Below this text is a "Login" button.

Logging on

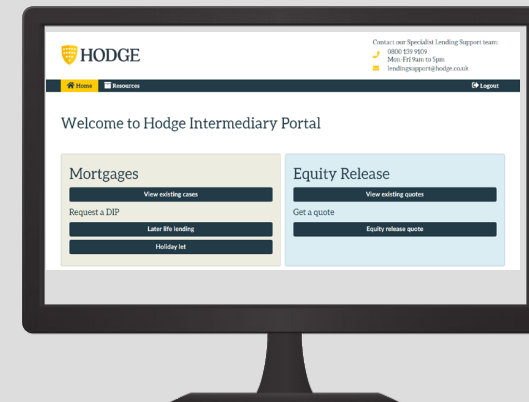
Making an application

To start the application process you'll need the unique username and password that you created when you first registered with us.

You'll also be asked for certain letters of your Security Word.



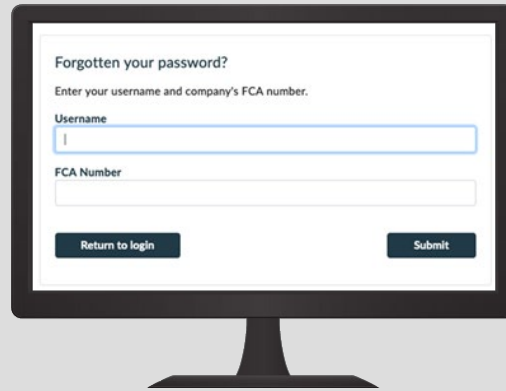
Landing page



Registration & Login



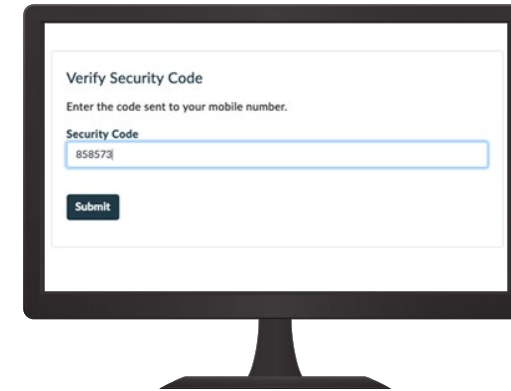
Forgotten your password?



A screenshot of a web browser displaying a form titled "Forgotten your password?". Below the title, it says "Enter your username and company's FCA number." There are two input fields: "Username" and "FCA Number". At the bottom of the form, there are two buttons: "Return to login" and "Submit".

You can reset your password by providing your Username and FCA reference number.

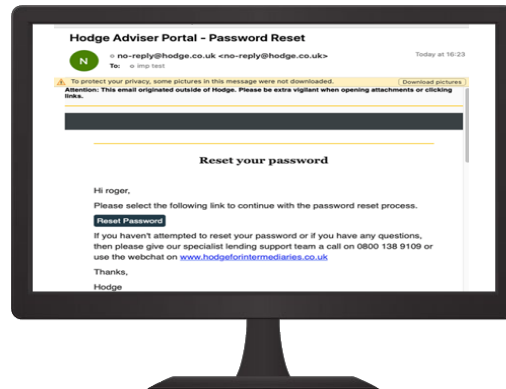
Security code SMS



A screenshot of a web browser displaying a form titled "Verify Security Code". Below the title, it says "Enter the code sent to your mobile number." There is one input field labeled "Security Code" containing the text "858573". At the bottom of the form, there is a "Submit" button.

After following the link you will be asked to provide the security code sent to your mobile number.

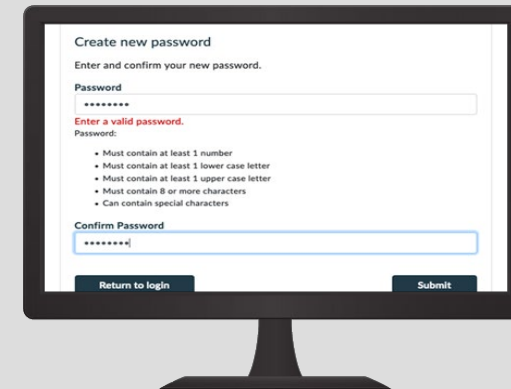
Password reset email



A screenshot of an email from Hodge Adviser Portal. The subject is "Hodge Adviser Portal - Password Reset". The email body says "Reset your password" and "Hi roger, Please select the following link to continue with the password reset process." There is a button labeled "Reset Password". Below this, it says "If you haven't attempted to reset your password or if you have any questions, then please give our specialist lending support team a call on 0800 138 9109 or use the webchat on www.hodgeforintermediaries.co.uk".

Once the details have been entered, an email will be sent providing a link to create a new password.

Create a new password



A screenshot of a web browser displaying a form titled "Create new password". Below the title, it says "Enter and confirm your new password." There are two input fields: "Password" and "Confirm Password". Below the "Password" field, there is a red error message "Enter a valid password." and a list of requirements: "Must contain at least 1 number", "Must contain at least 1 lower case letter", "Must contain at least 1 upper case letter", "Must contain 8 or more characters", and "Can contain special characters". At the bottom of the form, there are two buttons: "Return to login" and "Submit".

Now you can create a new password. Once reset, you will receive an email to confirm the password change.

Decision in Principle submission

If you're Directly Authorised, before submitting the application please choose the relevant commission payment route.

There is a field to enter any additional information such as:

- Use of a specific trading name
- Details of state benefits payable for life
- Established contractor income
- Private investment income
- Maintenance or spousal support
- Other details which could affect the application

Decision in Principle process

The application will be submitted to our underwriters for review.

You'll receive a link letting you know our current response times.

A PDF of all the information submitted will be available to view in **My Mortgage Cases**.

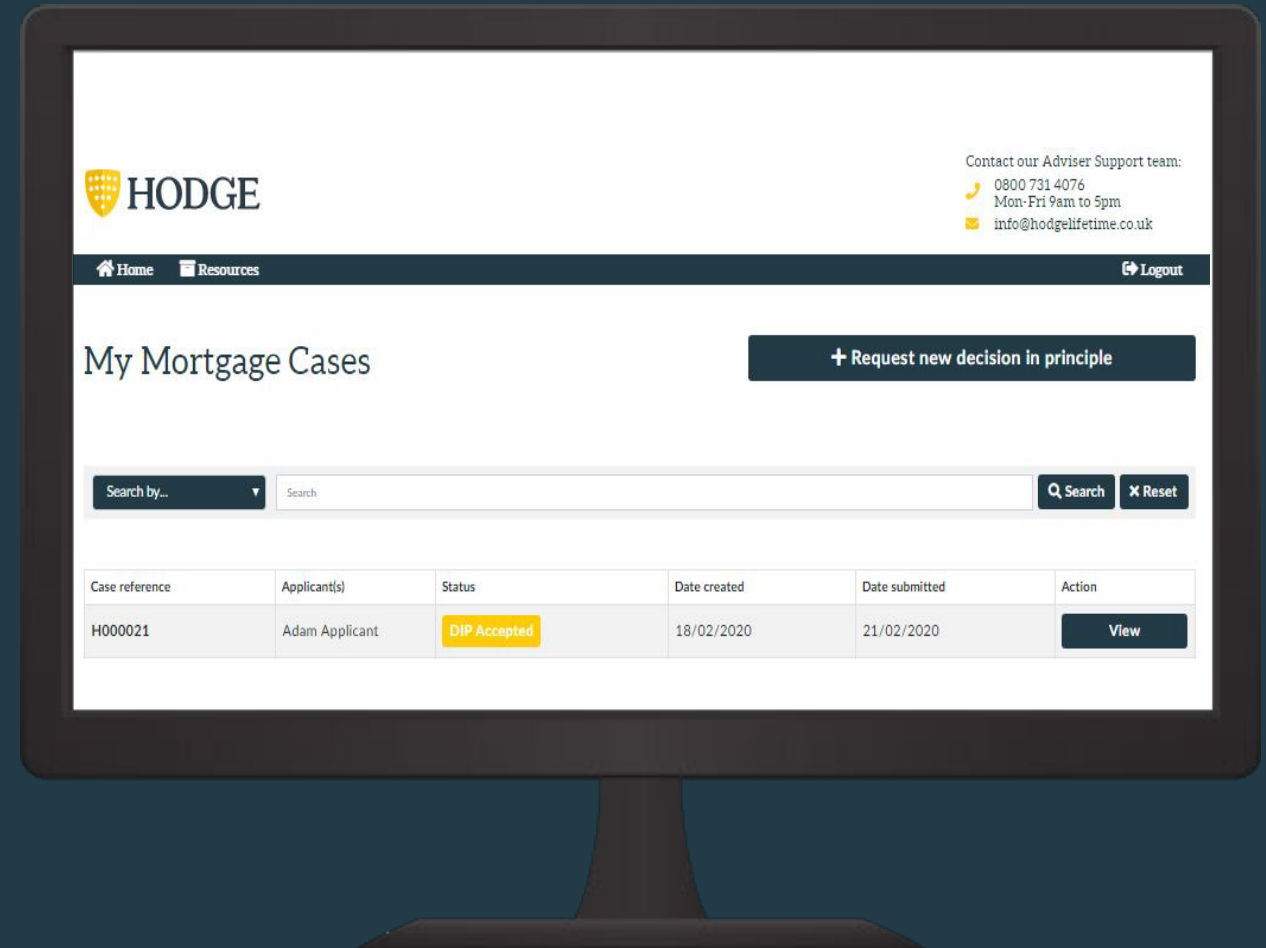
For all monthly payment products we'll obtain a credit search and credit score.

Decision in Principle accepted

We'll send you an email with an update for the relevant application once a decision has been made.

From the Hodge Adviser Portal Dashboard you can see the status of the application in **My Mortgage Cases**.

Once accepted, **View** the details to make any amendments, add any additional information and move the application forward.

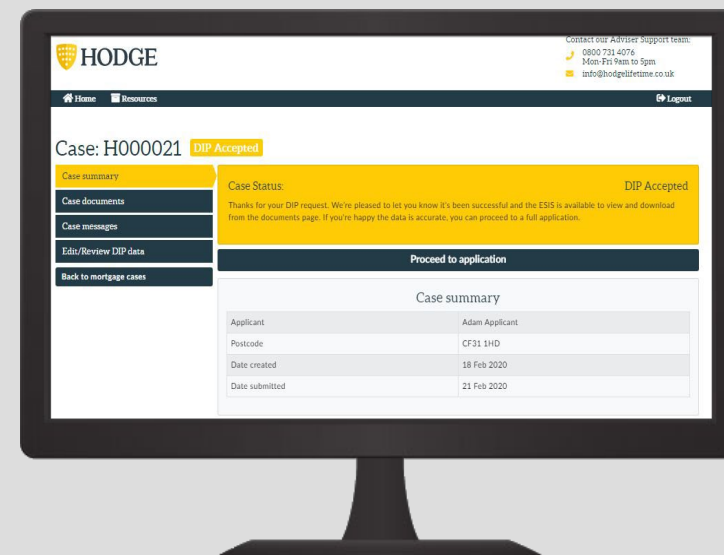


Submitting a Decision in Principle



Proceed to application

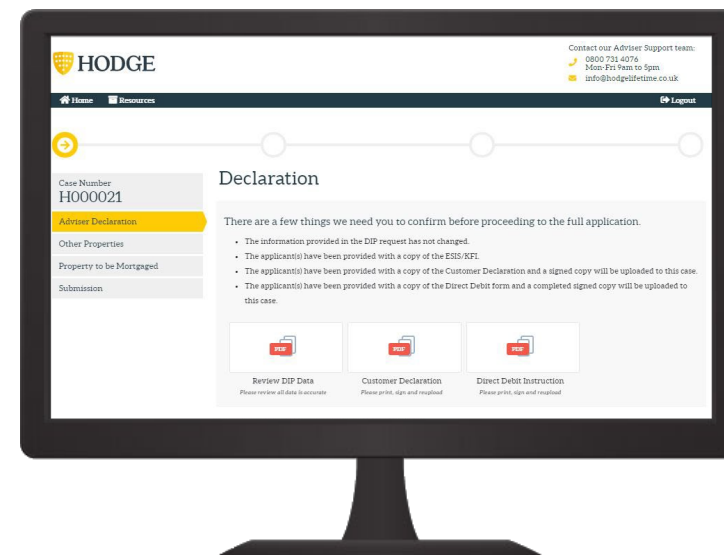
Once a Decision in Principle has been accepted you'll be given the option to **Proceed to application**.



Declaration

Please ensure the customer declaration and Direct Debit mandate are downloaded, signed and uploaded to our **Document Upload** section - we won't be able to progress past application stage without these.

Please also check the details from the DiP application for accuracy.



Application submission

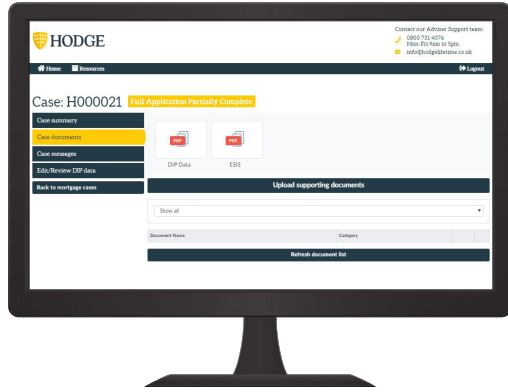
Before submitting the application, please make sure the information is accurate and up to date.

Any additional information about the application or servicing needs of the client can also be entered before submission.

Application received

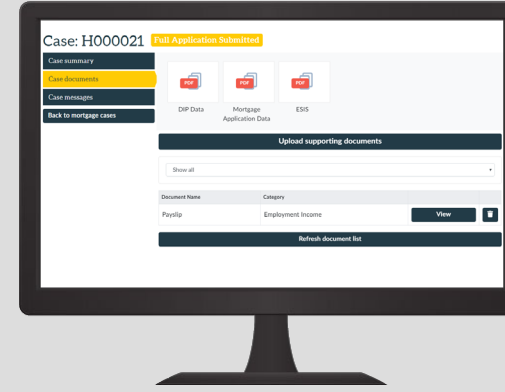
Documents can be provided using the **document upload** function.

Case documents



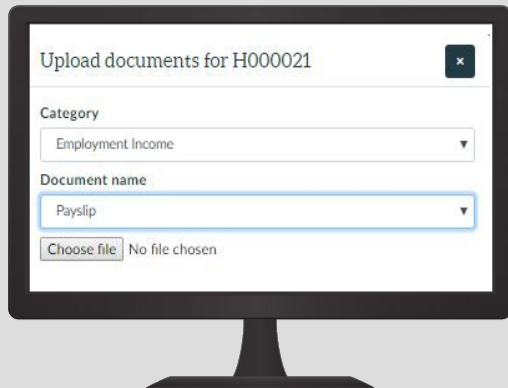
Upload documents using the document upload function. This can be found in the **Case documents** section within an application (accessed within **My Mortgage Cases**).

Downloading documents



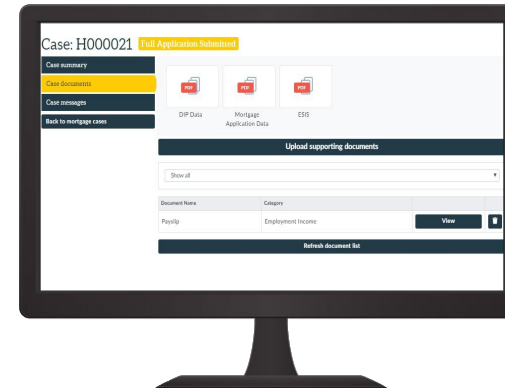
The ESIS, Offer and other case-relevant documentation can be downloaded from the **Case documents** section.

Upload supporting documents



Choose the relevant **Category** and **Document name** from the list before choosing the file you want to upload.

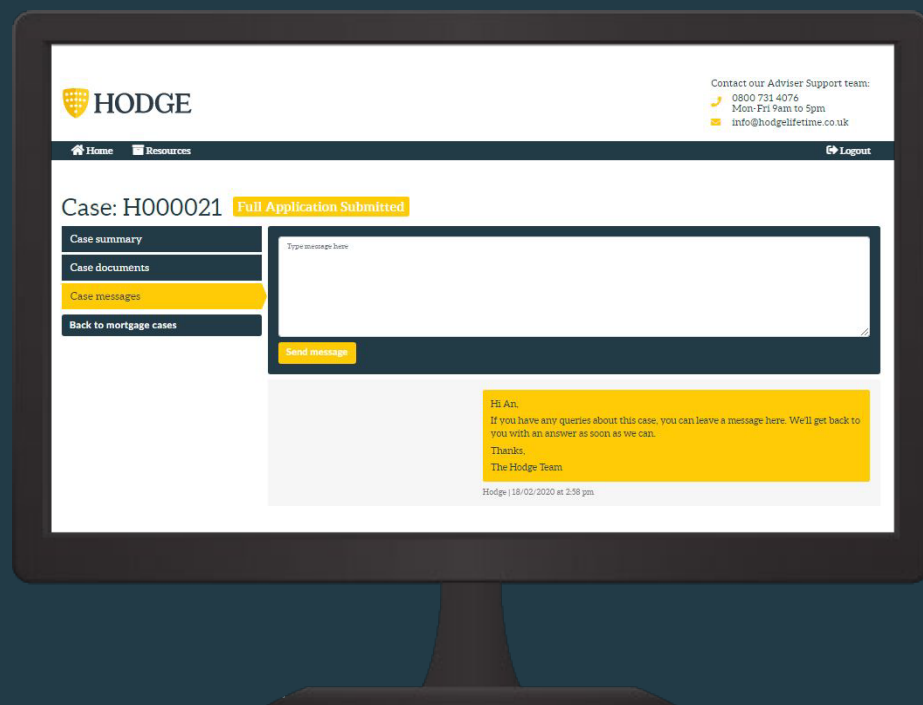
Viewing/Deleting supported documents



Once uploaded, you can view or delete documents when required in the **Case documents** section.

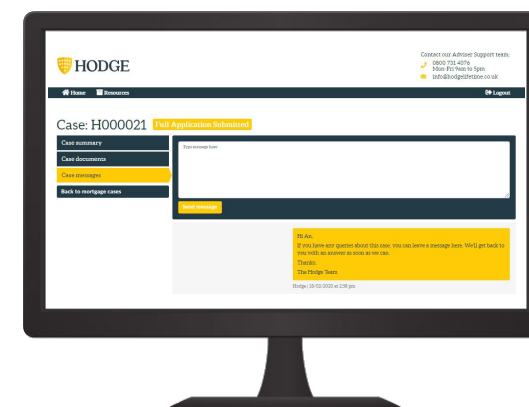
Case messages

Use the **Case messages** section to communicate with our underwriters about specific applications.



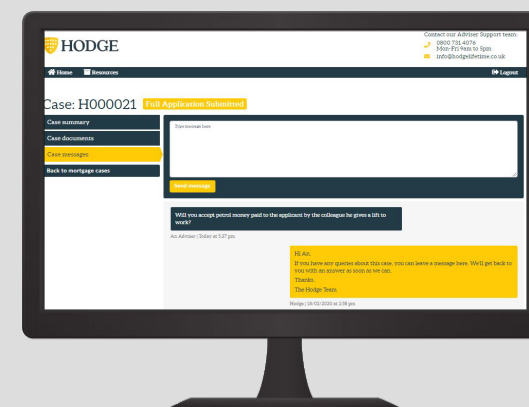
Case messaging

Sending a message



Our underwriting team will be alerted to any messages and will respond as soon as possible.

Message history



All historic messages can be found in the **Case messages** section.



0800 1389109



lendingsupport@hodge.co.uk



hodgebank.co.uk/intermediaries

Hodge is a trading name of Julian Hodge Bank Limited which is registered in England and Wales (no.743347). It is authorised by the Prudential Regulation Authority and regulated by the Financial Conduct Authority and the Prudential Regulation Authority. Its registered office is One Central Square, Cardiff, CF10 1FS.